

Chapter 11 – Filtering Inbox

The screenshot shows a 'Filters' dialog box with a title bar. Inside, there is a yellow instruction box at the top: 'Please select your filter criteria and click the Apply Filters button. To save filters as your default logon filters, please click the Save as Default Button.' Below this, there are two rows of controls. The first row has 'Filter by Activity:' with a dropdown menu showing 'Invoice Processing - Approval', 'Page Size:' with a dropdown menu showing '5', and a 'Filter by:' dropdown menu showing 'No Filter'. The second row has 'Filter by Section:' with a dropdown menu showing 'All Sections'. To the right of these controls are four buttons: 'Apply Filters', 'Reset Filters', 'Save as Default', and 'Restore Defaults'. A 'Begin Working' button is located to the right of the 'Save as Default' button.

The screenshot shows a list of invoices in an 'Unassigned' section. The list has columns for 'C' and 'V'. There are five rows of invoices, each with a green checkmark icon and a '1' in the 'V' column. At the bottom of the list, there are five numbered buttons: '1', '2', '3', '4', and '5'.

The default number of invoices viewable at one time is five. This number can be changed to 100.

Filtering an inbox can be beneficial if there are many invoices to process.

The screenshot shows a 'Filter by:' dropdown menu. The dropdown is open, showing a list of filter options: 'No Filter', 'COR360 Voucher Number', 'Vendor Number', 'Vendor Name', 'Invoice Number', 'Invoice Date', 'Amount', and 'PO Number'. The 'No Filter' option is currently selected and highlighted in blue.

Make sure filter values are typed correctly and also removed after a filter is finished. If filtering criteria is left, other invoices will not show up until the filter is reset.

To clear a filter, click Reset Filters and then Apply Filters